

OSC HR/Payroll SAP Training



Modifying Position/Employee Data and Reporting PA313 VC



SLIDE 1

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Notes


Welcome to *Modifying Employee Data and Reporting*, PA313 VC.

This virtual class is taught in two sessions: A and B. Based on the pace of the class, the instructor will determine a logical place to conclude session A (which may or may not be at the end of a lesson).

BEACON Training-Welcome and Introductions

Welcome to the *Modifying Position/Employee Data and Reporting* course.

- Introductions
- Breaks
- Parking Lots
- Classroom etiquette
 - Cell phones off
 - Quiet side conversations



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Notes

The course introduction is an opportunity to get to know others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

Prerequisites



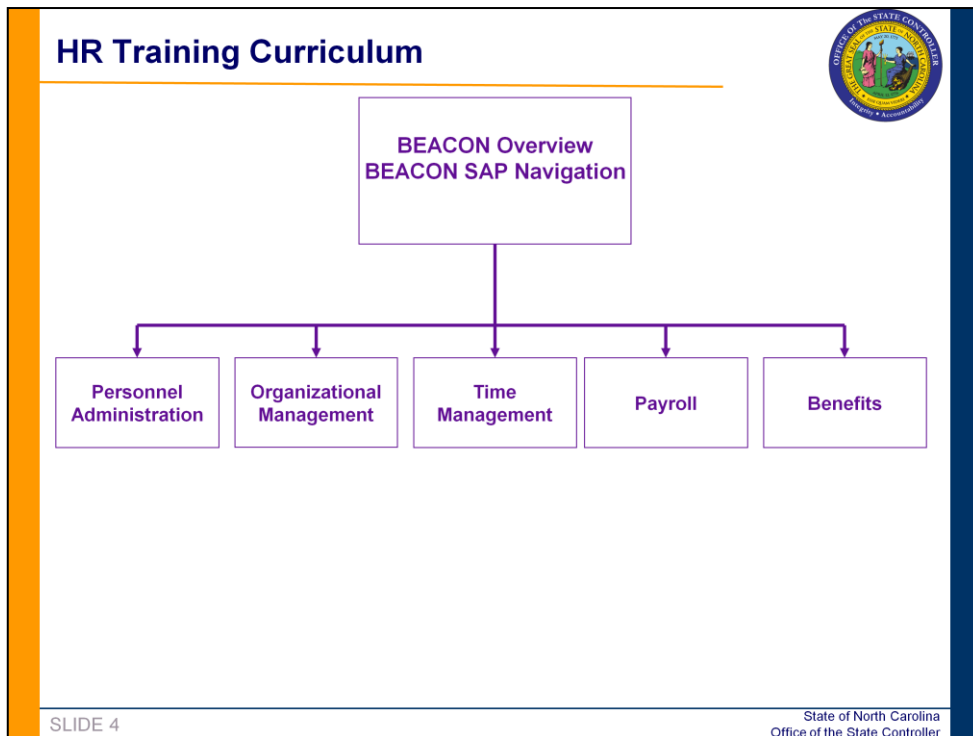
- BEACON Overview BC100
- BEACON SAP Basic Navigation BC110
- Personnel Administration Overview PA200
- Virtual Classroom Overview VC101
- Personnel Administration Terms, Concepts, and Display Data PA210
- Create and Maintain Employee Data PA310

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There are six prerequisites that you must take before attending this course. Attending these prerequisites ensures that you are adequately prepared with the new processes, concepts, and terms that are needed for successful completion of the *Modifying Position/Employee Data and Reporting* course.

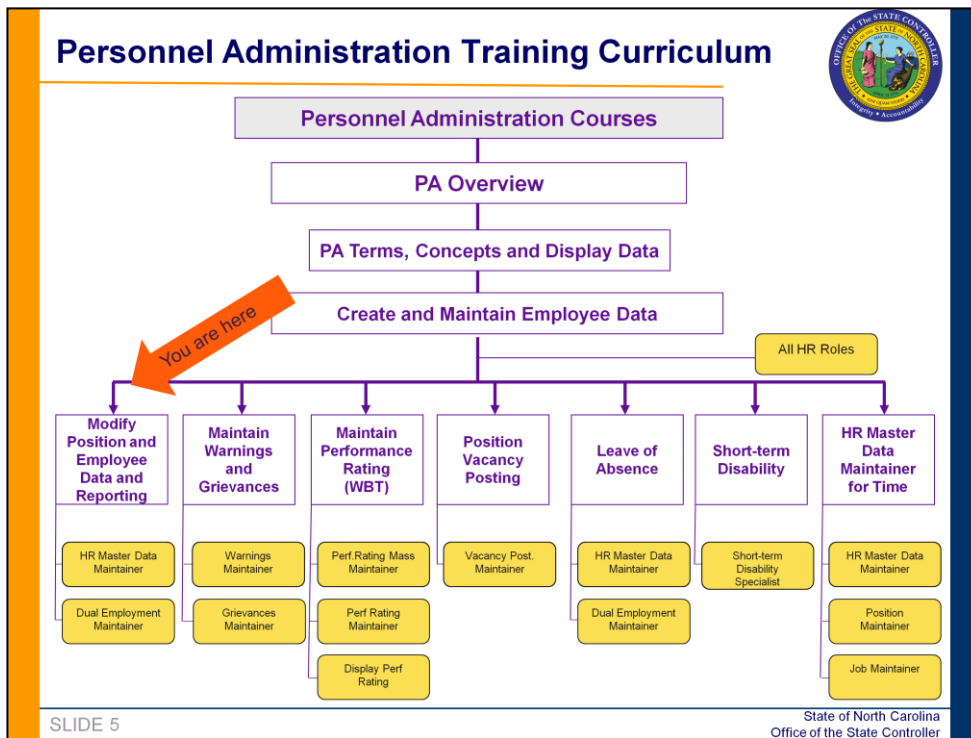
Notes



Notes

The OSC HR/ Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the Personnel Administration module.

BEACON Overview and BEACON SAP Navigation are self-paced, web courses.



Notes

Within the Personnel Administration module, there are several courses. Your position determines which courses you may be required to attend.

Personnel Administration Overview (PA200) is a self-paced, web course.

Course Map

- Lesson 1: Modifying Position Settings
- Lesson 2: Modifying Employee Data
- Lesson 3: HR Reports Overview
- Lesson 4: Course Review



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Notes

Course Objectives



Upon completion of this course, you should be able to:

- View position transaction code and infotypes
- Modify existing position and employee data
- Identify the options to access reports

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Notes

Welcome: Strategy for Training

Tell me	Concepts Your Instructor will describe the process, responsibilities and the transactions – LISTEN
Show me	Demonstrations Your Instructor will demonstrate job-related tasks performed in BEACON SAP – HANDS OFF
Let me	Exercises You will complete the exercises which allow for hands-on practice in class – HANDS ON
Support me	Availability Your Instructor will be available to answer questions while you complete the exercises

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Notes

The *Modifying Position/Employee Data and Reporting* Student Guide provides a copy of the PowerPoint presentation used in the classroom training. You will observe that space is available for you to write notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the OSC HR/Payroll SAP training environment.

You may also find it useful to take the *Employee Self-Service* and *Manager Self-Service* courses although they are not required for the PA curriculum. They are, however, mandatory for other requirements.

Course Map

- Lesson 1: Modifying Position Settings
- Lesson 2: Modifying Employee Data
- Lesson 3: HR Reports Overview
- Lesson 4: Course Review



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Notes

Lesson Objectives



In this lesson, you will:

- Identify the transaction code used to modify a position setting.
- Identify and modify position infotypes
- Explain when to notify payroll regarding changes in settings.

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Notes

Maintain a Position: PO13



PO13 is the transaction code used to revise a position setting. This is an OM role that some (but not all) Master Data Maintainers may be granted.

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Notes

HR personnel that have access to PO13 are responsible for updating the above infotypes on a position. The employee may enter hours correctly and the hours may have been approved by the manager, but unless the position infotype is flagged correctly, the employee will not receive the correct pay.

It is important to understand that if you **revise** a **position** setting that is **retro** to a pay period prior to the current pay period, you **must contact BEST Payroll** to let them know to run time eval on the affected employee's retro to that same time period. You only need to contact BEST Payroll if you retro-revise a position. If you only revise time on an employee, OSC HR/Payroll will automatically retro the time eval run.

Maintain a Position: PO13



PO13 is the transaction code used to revise a position setting. This is an OM role that some (but not all) Master Data Maintainers may be granted. For training purposed, assume that you do have this role.

Scenario:

You have received verification that the position settings were incorrect on the Information and Communication Specialist II position. Beginning today, the position will be eligible for Overtime Compensation and Holiday Payout; both with a 60-day payout.

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Notes

Position Infotypes - Employees and Time



Position flags set on specific infotypes also affect employee time and pay

- Substitutions IT2003
- Overtime Compensation – IT9005
- Holiday Payout Period – IT9006
- Night Shift Premium – IT9007
- Evening Shift Premium – IT9008
- Weekend Shift Premium – IT9009
- Holiday Premium Rate – IT9010
- On-Call – IT9011
- Callback – IT9012

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Notes

IT2003 Substitutions

Infotype Edit Go Extras System Help

Create Substitutions (2003)

Personal work schedule Activity allocation Cost assignment External services

Personnel No: 88000327 Name: Kumar, Reinaldo02
 EE group: SPA Employees Personnel ar: 4601 Cultural Resources
 WVS rule: D01N086N | MTWVHF-8, SaS-O Status: Active
 From: 08/18/2008 To: 08/18/2008

Subst type: 02 Shift substitution

Daily work schedule
 Daily work schedule:

Work schedule rule
 Work schedule rule: ES grouping:
 Holiday Calendar ID: PS grouping:

Substitution Type (1) 11 Entries found

Type	Text
01	Employee Substitution
02	Shift substitution

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Notes

The **Substitutions 2003** infotype is used to indicate that the employee is temporarily working something other than his or her regular schedule. Substitutions may be daily or for weeks at a time. IT0007 – Planned Working Time is overwritten with the properties of the Substituted schedule. An example could be when:

- An employee is working at a time other than his or her planned work schedule (for example: employee works a shift with premium pay is being asked to work a shift where premium pay is not eligible or is eligible at a different rate, or vice versa).

Substitution is *only* used when the work schedule change is temporary. If the employee will be permanently assigned to a new schedule, use IT0007 to change the Work Schedule Rule appropriately.

Overtime Compensation



Infotype Edit Goto View System Help

Create Overtime Compensation

Position	800904000836	Museum Specialist
Planning Status	Active	
Validity	08/28/2008 to 12/31/9999	Display change info

Overtime Compensation 01 S 65001751 1

OT Compensation Eligible ☒

Immediate Payout ☐
OR

Comp Aging Limit Days

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Notes

Overtime Compensation (IT9005)

If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record. If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked. The default is 365 days. The setting on IT9005 in conjunction with IT2012 (discussed later) determines the rules around the overtime compensation.

As indicated previously, an employee may have worked over 40 hours and entered the hours on the time sheet and they may have been approved by the manager. But unless the position Overtime Compensation infotype is flagged correctly, the employee will not receive overtime compensation. An IT9005 record is not required if the position is not eligible for overtime pay or compensation.

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Holiday Payout Period (IT9006)

The default is 365 days. If no record exists, the default value of 365 applies.

Shift Premiums

Create Night Shift Premium

Position: 800904000836 Museum Specialist
 Planning Status: Active
 Validity: 08/18/2008 to 12/31/9999 [Display change info](#)

Night Shift Premium 01 S 65001751 1
 Night Shift Prem Elig ☒
 Night Shift Prem Rate 10 %

Create Evening Shift Premium

Position: 800904000836 Museum Specialist
 Planning Status: Active
 Validity: 08/18/2008 to 12/31/9999 [Display change info](#)

Evening Shift Premium 01 S 65001751 1
 Evening Shift Prem Elig ☒
 Evening Shift Prem Rate 10 %

Create Weekend Shift Premium

Position: 800904000836 Museum Specialist
 Planning Status: Active
 Validity: 08/18/2008 to 12/31/9999 [Display change info](#)

Weekend Shift Premium 01 S 65001751 1
 Weekend Shift Prem Elig ☒
 Weekend Shift Prem Rate 10 %

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Notes

Positions eligible for any of the premiums listed below must have valid infotypes.

Night Shift Premium (IT9007)

OSP approved rates other than the default of 10% must be entered in the rate field.

Evening Shift Premium (IT9008)


OSP approved rates other than the default of 10% must be entered in the rate field.

Weekend Shift Premium (IT9009)

OSP approved rates other than the default of 10% must be entered in the rate field.

The various types of premium pay display as separate line items on the employee's pay stub only if the rates are different. For example, if an employee's evening and night shift are both 10%, the hours worked in the evening and night are added together on one "Shift Premium" line item on the pay stub with the rate of 10%. On the other hand, if the evening rate is 10% and the night is 15%, two separate line items will show with the hours entered for the evening separate from the hours entered for night.

Holiday Premium Rate



Infotype Edit Goto View System Help

✓ ✗ 🔍 📄 🔄 👤 🔗 🔧 🔑 🔒 🔓 🔔 🔕 🔖 🔗 🔧 🔑 🔒 🔓 🔔 🔕 🔖

🔧 🔑 🔒 🔓 🔔 🔕 🔖 🔗 🔧 🔑 🔒 🔓 🔔 🔕 🔖

Create Holiday Premium Rate

Position

800904000836 Museum Specialist

Planning Status

Active

Validity

08/20/2008

to

12/31/9999

🔗 Display change infor

Holiday Premium Rate

01 S 65001751 1

Holiday Premium Rate

50 %

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Notes

Holiday Premium Rate (IT9010)

IT9010 is only required if the Holiday Premium Rate is different than 50%.

OSP approved rates other than the default of 50% must be entered in the rate field.

On-Call



Infotype Edit Goto View System Help

Create On-Call

Position

800904000836 Museum Specialist

Planning Status

Active

Validity

08/18/2008

to

12/31/9999

Display change infor

On-Call

01 S 65001751 1

On-Call Eligibility ☒

On-Call Comp Accrued ☐

On-Call Rate

\$ 8.94

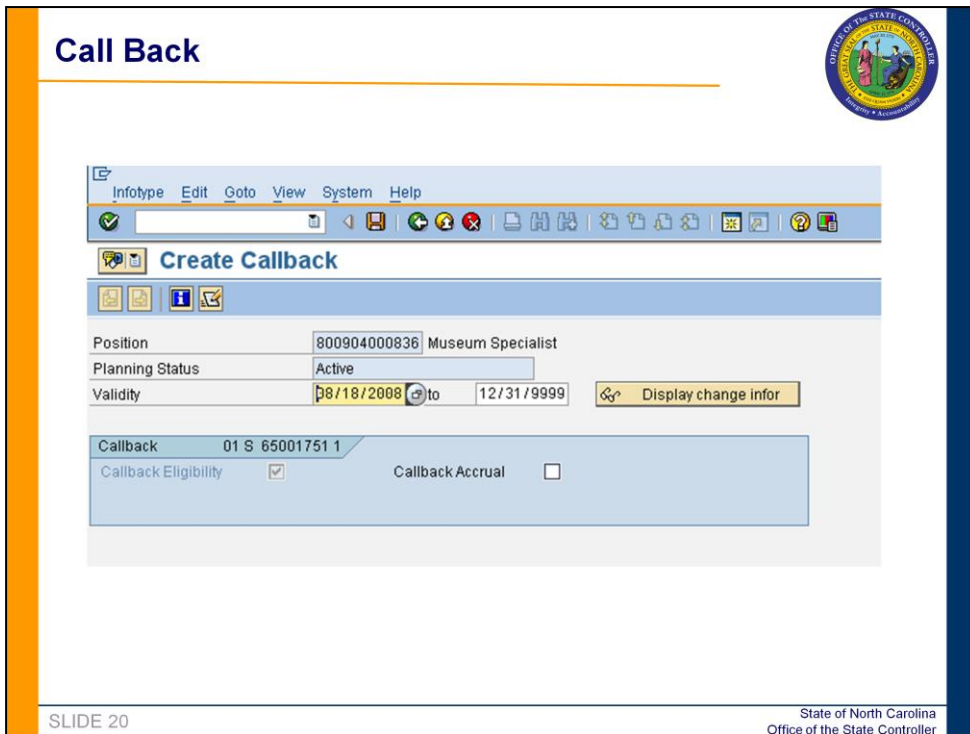
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Notes

On-Call (IT9011)

Positions eligible for On-Call compensation must have a valid IT9011 record.

The accrued box should be checked if the time is to be collected as On-Call comp time. The rate field must be populated with the OSP approved on-call rate.

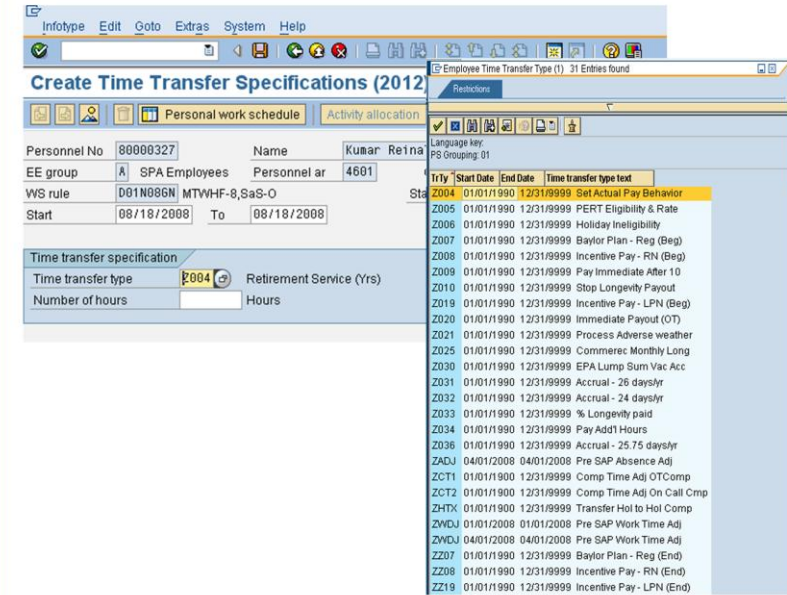


Notes

Callback (IT9012)

Positions eligible for Callback compensation must have a valid IT9012 record. The decision to pay versus comp time is determined by the Callback Accrual checkbox.

IT2012 – Time Transfer Specifications



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Notes

The “Time Transfer Specifications” infotype (IT2012) can be used to influence time management behavior and is typically applied to an employee by the Time Administrator. Infotype 2012 records are created for specific employees for specific periods of time. As the HR Master Data Maintainer, it may be helpful if you understand the following subtypes for the time infotype 2012:

2004 - Set Actual Pay Behavior

Applicable for “positive time/exception pay” employees. This subtype record will cause the generation of “leave without pay” wage types to fill the difference between reported hours and planned hours. In effect this causes the employee to be treated as a “positive time/actual pay” employee.

2005 - PERT Eligibility and Rate

This subtype is applicable for DOC employees eligible for PERT (Prison Emergency Response Team) premiums.

2006 - Holiday Ineligibility

This subtype record will cause the suppression of Holiday Premium Pay during the validity period specified.

IT2012 – Time Transfer Specifications (cont.)

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Notes

2007 - Baylor Plan – Reg (Beg)

ZZ07 - Baylor Plan – Reg (End)

Applicable RNs working under a regular Baylor Plan contract.

2018 - Baylor Plan + Bonus (Beg)

ZZ18 - Baylor Plan + Bonus (End)

Applicable RNs working under a Baylor Contract with a bonus at the completion of the contract

2008 - Incentive Pay – RN (Beg)

ZZ08 - Incentive Pay – RN (End)

Applicable RNs working under an Incentive Pay contract

2019 - Incentive Pay – LPN (Beg)

ZZ19 - Incentive Pay – LPN (End)

Applicable LPNs working under an Incentive Pay contract

2009 - First 10 hrs Comp

Applicable for subject employees who have a position with an Overtime Eligibility (IT9005) record that does not indicate “paid immediately”. This subtype record will cause the additional hours worked beyond 50 in a week to be “paid immediately”. The first 10 hours of additional time worked will be compensated with Compensatory Time at the appropriate rate.

Knowledge Check #1



- Use your computer to answer the questions and then click **Submit**.

A screenshot of a web-based polling application window titled "Polling". It displays two questions with radio button options. Question 1 asks if a record with an end date other than 12/31/9999 has been delimited, with options "a.True" and "b.False". Question 2 asks if SAP organizes Human Resources information into units called infotypes, also with options "a.True" and "b.False". A "Submit" button is at the bottom, and a footer note states "Your answers may be recorded." The window also shows a time elapsed of 0:23 and a time limit of 5:00.

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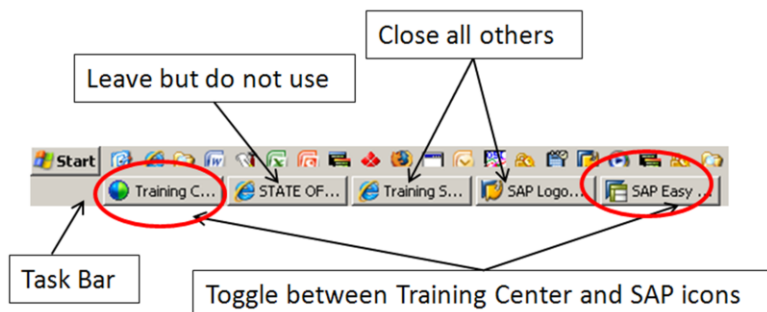
Notes

1. The transaction code PO13 is used primarily to:
 - a. Create a position.
 - b. Maintain or modify a position setting.
 - c. Create employee information.
 - d. Give yourself a promotion.
2. Some examples of Position Infotypes might be Overtime Compensation, Night Shift Premium or On-Call.
 - True
 - False
3. If a position setting needs to be made retroactive, you must:
 - a. Backdate all associated infotypes.
 - b. Leave dates current and SAP will automatically revise the position setting.
 - c. Contact BEST Shared Services so they can manually run a time eval on any affected employees.
 - d. Panic.

Performing Class Exercises (1 of 2)



After you logon to SAP, use the icons on your taskbar to move back and forth between the Training Center presentation and SAP



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Notes

To perform exercises in a virtual class, you will navigate back and forth between the SAP application and the Webex Training Center. You will close some of the icons that display on your taskbar to make it less confusing about which icons to use.

Look at the bottom of your screen now and you should see two icons:

- State of NC- Office of Controller Webex
- Cisco WebEx Training Center (formerly Training Center)


You will leave both of these **open** during the course. If you have **other** applications open, you should **close** them now.

Give me a green check to let me know you see these two icons on your taskbar.

Performing Class Exercises (2 of 2)

After you complete a Virtual class exercise:

- Access the Training Center from your taskbar
- In the Participant's panel, click the **green check** icon
- Leave the green check active – the instructor will clear it



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Notes

By using the green check to indicate you have completed an exercise, the instructor can see at a glance those students who may need additional time.

Exercise 1.1



Log onto SAP:

1. Use the task bar to open a new internet window.
2. Access SAP with your own user id and password.
3. Click the training GUI.
4. Click Training Sandbox E1T 899.
 - a) If necessary, enter your own user id and password again.
5. The Easy Access screen displays.
6. On the taskbar, **leave open** the **Cisco WebEx Training Center**, **SAP Easy Access** and **State of NC** icons; close all other icons.
7. Click the Training Center icon on your taskbar to return to the Training Center.
8. Use the **Green Check** icon to let the Instructor know you have successfully logged on. Instructor will remove the check.



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Notes

Exercise 1.2



- You have received verification that the position settings should be revised on the Information & Communication Specialist II position.
- Beginning today, the position will be eligible for Overtime Compensation and Holiday Payout.

Student #	Position #
1	65002527
2	65002528
3	65002529
4	65002530
5	65002531
6	65002532
7	65002533
8	65002534
9	65002535
Instructor	65002536

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Notes

Lesson Review



In this lesson, you learned to:

- Identify the transaction code used to modify a position setting.
- Identify and modify position infotypes
- Explain when to notify payroll regarding changes in settings.


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Notes

Course Map

- Lesson 1: Modifying Position Settings
- Lesson 2: Modifying Employee Data**
- Lesson 3: HR Reports Overview
- Lesson 4: Course Review



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Notes

Lesson Objectives



Upon completion of this lesson, you should be able to:

- Describe the process to modify (or maintain) employee data
- Identify the transaction code used to update employee data
- Distinguish among the editing functions
- Use OSC HR/Payroll SAP to maintain employee data
- Identify the steps needed prior to creating an employee's benefits adjustment
- Create a substitution
- Revise a work schedule
- Create a benefits adjustment

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Notes

In this lesson, you will enter data into specific infotypes, based on the type of information that needs to be created or revised. You will determine and select the specific infotype to be revised.

Workflow (the electronic approval process) is not required for maintaining employee data; however, you should continue to use the proper documentation that authorizes the revisions you are making, just as you have done in the past.

PA 30 – Maintain Master Data



HR master data Edit Goto Extras Utilities Settings System Help SAP

Maintain HR Master Data

Personnel no. 5

Name Rebecca Sutton

EE group 3 Elected Pers. area 0290 Court Administration

EE subgroup E4 State Judge Cost Center 29000027 State Court #2--

Basic Personal Data Payroll Benefits Time Recording Addtl. Person...

Infotype text E

Actions (0000) [X]

Organizational Assignment (0001) [X]

Personal Data (0002) [X]

Addresses (0006) [X]

Planned Working Time (0007) [X]

Basic Pay (0008) [X]

Family Member/Dependents (0021) [X]

Residence Status (0094) [X]

Additional Personal Data (0077) [X]

Period

Period

Fr. To

☐ Today ☐ Curr. week

☐ All ☐ Current month

☐ From curr. date ☐ Last week

☐ Up to Today ☐ Last month

☐ Current Period ☐ Current Year

Choose

Direct selection

Infotype STy

RQ1 (1) (800) Jacky...

Area to enter
Infotype and
subtype
number directly

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After employees are hired, circumstances may arise that make it necessary to enter new data or revise existing data.

Use **PA30** to access the Maintain HR Master Data screen. There are several options available, which are the same options you saw in **PA20**-Display Master Data. The options are:

Tabs: The infotypes are grouped together by subject matter on a Tab menu. Simply select the Tab you want to access, or use the display all tabs button. After you select the appropriate tab, you may have to scroll to find the specific infotype.

Period: You have various options regarding the time frame you wish to use when displaying an infotype. Some infotypes will display only if the All option has been selected.

Direct Selection: You can either enter the infotype code and subtype in the Direct Selection field, or use the matchcode to search for the infotype. You don't have to be on a specific tab to use the Direct Selection option.

Infotype Dates



- Effective (start) must be entered
- OSC HR/Payroll SAP applies 12/31/9999 as end date
- Former data (when applicable) is delimited one day prior to the new effective date

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Notes

Each entry must have an effective (beginning) date and an ending date. In most cases you will not enter an end date; OSC HR/Payroll SAP will automatically apply the end of time for the new data. In addition, OSC HR/Payroll SAP automatically delimits the previous infotype to one day prior to the new data.

Infotypes Delimited

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Notes

In the above example, the employee moved to a new permanent address effective 8/16/2007. When the new permanent address was entered with the 8/16/2007 effective date, OSC HR/Payroll SAP automatically assigned the end date as 12/31/9999 and delimited the old permanent address to 8/15/2007.

The employee's other addresses, emergency contact and mailing address, still have their original end dates of 12/31/9999 because no changes have been made to them. In this case, the Addresses infotype has several subtypes, all with ending dates of 12/31/9999.

NOTE: The Emergency subtype is an exception to the automatic delimit rule. OSC HR/Payroll assumes an employee may have more than one emergency contact; therefore the previous emergency record is not automatically delimited. You must manually delimit the previous emergency record if it is no longer applicable.

PA Infotypes Online Job Aid



- Job Aid – Online you will find a list all Personnel Administration (PA) infotypes and their descriptions.
- Exercises: In the exercises that follow you will maintain the following infotypes:
 - Verify Education
 - Monitoring of Tasks
 - Objects on Loan
 - Bank Details
 - Substitutions
 - Planned Working Time
 - Adjustment Reasons

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Notes

The *PA Infotypes* job aid is available online. The job aid contains a complete list of all the infotypes used in Personnel Administration, including codes and brief descriptions.

In this class, you will have an opportunity to maintain several infotypes. After you learn to maintain one infotype, you will realize that generally you use the same process and methodology to maintain any infotype.

Discuss with the Instructor any questions you have about infotypes and their descriptions.

A condensed version of the job aid is available as a handy job aid for use at your work station. The condensed version is also available online by the title of Dashboard Front and Dashboard Back.

http://help.mybeacon.nc.gov/beaconhelp/Human_Resources/Personnel_Admin/Job_Aids/pdf_Dashboard%20for%20PA_front%20V2_020108.pdf

http://help.mybeacon.nc.gov/beaconhelp/Human_Resources/Personnel_Admin/Job_Aids/pdf_Dashboard%20for%20PA_back%20V3_022608.pdf

Maintain HR Master Data



Maintaining HR Master Data records involves processing existing HR master data records by one of the following functions:

- Creating new data
- Changing existing data
- Delimiting existing data
- Deleting data (only used by HR!)
- Copying data (to maintain history)

Access is determined by OSC HR/Payroll SAP security and your HR BEACON roles.

Employees with access to Employee Self-Service can make certain changes to their employee records.

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Notes

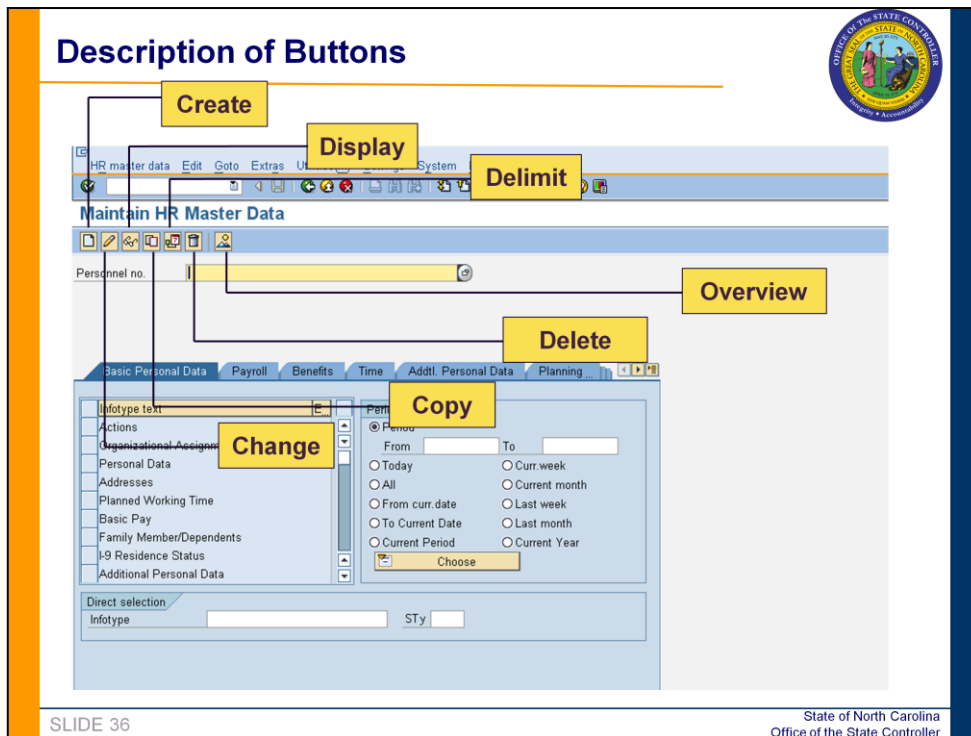
Using **PA30 – Maintain Master Data**, allows you to use the various functions to create, correct, copy, change, and delete information, or enter a stop date on a specific infotype.

As indicated in the OSC HR/Payroll SAP Navigation course, screens and tasks to which you have access are determined by your BEACON SAP security role. Only certain business roles will have the security access to maintain master data records for the employees in your agency.

Some personnel information can be changed by the employee through Employee Self-Service (ESS), including:

- Tax Withholding
- Addresses
- Family Member/Dependents
- Bank Information

However, in order to provide you an opportunity to practice, the exercises in the training are designed to assume the employees do not have access to ESS.



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Notes

There are several ways to Maintain Master Data as listed below.

Create: Create a new infotype for an existing employee.

Change: Do not use! A decision has been made that State HR will use the Copy function with the original date to overwrite existing data and correct data. You will not use the Pencil icon. You can only correct a current (not historical) record. Only BEST Shared Services can make changes to historical records.

Delete: Eliminate a record. This function should be used with caution, because it permanently removes the information from the database, and cannot be retrieved. Only a select number of HR employees will have security access to use the Delete function.


Delimit: Enter an end date on an infotype to make it inactive.

Copy: Modify or update an infotype to ensure that history is maintained (as long as you change the effective date accordingly). If you don't use a new effective date, you are overwriting history on some infotypes. You must ensure that you use the new effective date when you use this function.



Display: View an individual infotype.

Overview: View a list or summary of the infotype's data.

Copy Dates are Critical



History versus no history – depends on date you use

- 
 - Copy to correct data on some infotypes – no history if you use the same effective date
- 
 - Copy - history (only if you use new effective date)

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There is an important distinction between using the Copy function with the original date and with a new effective date:

- Use the original date when you need to correct an error on existing infotypes. By using the infotype's original date, you are overwriting the history. Be aware that you can only use the Copy function to correct errors on some infotypes. For others, you will have to contact BEST.
- Use a new effective date when you want to create history.

The original date is used to correct data errors. Using this function overwrites the existing data; therefore, there is no history of the former erroneous data. For example, if the person's last name was entered incorrectly, you would not want the incorrect spelling on the employee's record. Using Copy function with the original date in this instance is appropriate so the correct last name is displayed in the employee's record.

You must be extremely careful about the date when using the Copy function. For example, an employee has bank "A", and wants to change to bank "B" the first of next month. If you use the Copy function with the new date (the first of next month), there is a history of both banks. On the other hand, if you used Copy and forgot to put in the new date, it would look as if the employee had always used bank "B"; there would be no history of bank "A". Remember, when using Copy with the original date, there is no history.

NOTE: You can only Copy current records. Keep in mind all history changes must be sent to BEST Shared Services to be changed. This is the same as you did in PMIS with prior forms to OSP for approval/entry.

Notes


Corrections for Specific Errors

- **Wrong Employee Group/Subgroup was processed**
 - PA30 and access via Actions infotype
 - Use Overview and Copy functions

NOTE: Only use this option if Employee Group/Subgroup are wrong. Use Appointment Change Action if circumstances have warranted a new Employee Group/Subgroup.
- **Wrong Hire Date or Separation Date was processed**
 - PA41

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Corrections for Specific Errors

Below is additional information on how to make corrections to specific errors. You will not perform these corrections in class.

Correct an Employee Group/Subgroup

Caution! Only use these steps if the wrong EEGroup or Subgroup was entered and needs to be corrected. If the EEGroup or Subgroup needs to be changed because the employee's circumstances have changed, use Appointment Change, Transfer or Promotion Actions as applicable.

1. Access employee via PA30.
2. Select the Actions infotype.
3. Click the Overview button.
4. Select the line item for the Action that contains the wrong employee group/subgroup.
5. Click Copy.
6. Change the field(s) as applicable to correct.
7. Save. A message displays that your entry will delete a record. Click the green check.
8. Page forward (past Personal Data) until you reach the Organizational Assignment infotype.
9. Click Save.

Correct Hire Date or Separation Date—use PA41

Caution! Only the HR Master Data Approver can make the correction and can only do so if the Action has been completed, and prior to the payroll cutoff date. Having to use this transaction code should be an infrequent occurrence, not a regular one.

Notes


Instructor Demonstration

PA30 Maintain Employee Data

- Education


In this demonstration, the Instructor will:

- Indicate that an employee's education has been verified



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Notes

Watch the Instructor complete the exercise. The Instructor will demonstrate using the student scenario. Review the steps on eAssistant as the Instructor demonstrates the process.

Exercise #2.1**PA 30 – Maintain HR Master Data –
Verify Education**

Today you received verification from the educational institution that Jimmy Chonez has a bachelor's degree.

Enter the verification on the employee's record.

Student #	Employee #
1	10000022
2	10000023
3	10000024
4	10000025
5	10000026
6	10000027
7	10000028
8	10000029
9	10000030
Instructor	10000011

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Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

Exercise #2.2



PA 30 – Maintain HR Master Data - Monitoring of Tasks

Janet Thomas has indicated that she is an RN (Registered Nurse) on her application. This needs to be verified within 90 days of her hire date. Assume her hire date is today.

Enter the data on the employee's record. Remember – upon completing this verification, the processing indicator would need to be changed to "task completed."

Student #	Employee #
1	80000286
2	80000287
3	80000288
4	80000289
5	80000290
6	80000291
7	80000292
8	80000293
9	80000294
Instructor	80000295

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Notes

IT0019 is like a tickler file that is date driven. A report is run to determine which employees have transactions coming due soon. Run BI report B0099 or the Date Monitoring report (S_PH0_48000450) in SAP to view the various tasks due. If the task is completed prior to the due date entered, it will still display on the Date Monitoring report unless you change the end date of the Monitoring of Tasks infotype.

You may need to enter more than one IT0019 for a transaction. For example, if the above employee was a new hire, you would enter IT0019 to follow-up on the probationary period, and another one regarding the foster child documentation.

Exercise #2.3**PA 30 – Maintain HR Master Data –
Delimit Objects**

Marsha Sanders has been notified that the position she currently holds no longer requires that she have a badge and a cell phone. She turned in both of the items today. Delimit the items on the Objects on Loan infotype using the applicable subtypes.

Student #	Employee #
1	80001163
2	80001164
3	80001165
4	80001166
5	80001167
6	80001168
7	80001169
8	80001170
9	80001171
Instructor	80001172

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Exercise #2.4

PA30 Maintain Employee Data – Maintain Bank Details

Rose Brown has informed you that in addition to her current bank she has a new bank to which she wants to direct 25% of her direct deposit into a checking account. In addition, she wants \$100 to go to the new bank into a savings account. The remainder will go to the current bank in her checking account. The effective day is the first of next month.

Update the employee's OSC HR/Payroll SAP record to reflect the change to the banking information. Her new bank is Capital. The bank key is 053112123. Her checking account number is 84568; savings is 684511.

Student #	Employee #
1	80000165
2	80000166
3	80000167
4	80000168
5	80000169
6	80000170
7	80000171
8	80000172
9	80000173
Instructor	80000174

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Notes

If an employee wants to close an account and move to a new account, you should advise the employee to leave the old bank account open until the direct deposit has correctly been made to the new bank or the new account.

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

Exercise 2.5



PA 30 – Maintain HR Master Data – Shift Substitution

Jimmy Chonez is being asked to work the day shift Saturday and Sunday next week which are normally his days off. His normal work schedule and position settings indicate that he gets night shift premium. For these two days, night shift premium should not be paid.

Create a Substitution for him for those two days and select the appropriate Daily Work Schedule (DWS).

Student #	Employee #
1	10000022
2	10000023
3	10000024
4	10000025
5	10000026
6	10000027
7	10000028
8	10000029
9	10000030
Instructor	10000011

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Notes

Shift substitution (subtype 02) - A shift substitution involves specifying a Daily Work Schedule (DWS) or Work Schedule Rule (WSR) that the substituting employee will work during the period of the substitution record. A DWS should be used for a substitution of a single day. A WSR substitution is more appropriate for a longer substituting period.

After a Substitution record is created, the maintenance of the record is very important due to the possible changes in compensation due to substitutions for premium eligible shifts. If the actual period or date of the Substitution changes, the relevant Infotype 2003 record must also be updated to ensure proper compensation. If a Substitution is no longer necessary or an employee did not actually work the assigned substitution shift, the relevant record should be deleted to ensure additional compensation is not earned through the original Substitution assignment.

Exercise 2.6**PA 30 – Maintain HR Master Data –
Work Schedule**

The first day of next month, Jimmy Chonez has requested and been granted a permanent move from his current shift to a 4-day work week nights, 10 hours Tuesday – Friday with Monday, Saturday, Sunday off.

Access the applicable infotype and update Jimmy's files.

Student #	Employee #
1	10000022
2	10000023
3	10000024
4	10000025
5	10000026
6	10000027
7	10000028
8	10000029
9	10000030
Instructor	10000011

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Exercise #2.7**PA 30 – Maintain HR Master Data –
Withholding W4**

Effective today, Leona Grayson would like to have her federal and state withholding changed from 0 allowances to 1. In addition, she does not want any additional money withheld.

Enter the data on the employee's record.

Student #	Employee #
1	80000145
2	80000146
3	80000147
4	80000148
5	80000149
6	80000150
7	80000151
8	80000152
9	80000153
Instructor	80000154

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Knowledge Check #2



- Use your computer to answer the questions and then click **Submit**.

Time elapsed: 0:23 Time limit: 5:00

Poll Questions:

1. A record with an end date other than 12/31/9999 has been delimited.
☐ a. True
☐ b. False

2. SAP organizes Human Resources information into units called infotypes.
☐ a. True
☐ b. False

Submit

Your answers may be recorded.

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Notes

1. If an employee is working a different schedule temporarily, which infotype is used?
 - a. Substitutions IT2003
 - b. Planned Working Time IT0007
2. If you need to remind yourself to complete a certain task, you would create:
 - a. Objects on Loan IT0040
 - b. Planned Working Time IT0007
 - c. Substitutions IT2003
 - d. Monitoring of Tasks IT0019
3. A factor that affects an employee's overtime, shift premium and holiday pay are the settings on the employee's position.
 - ☐ True
 - ☐ False
4. Which of the following is NOT true?
 - a. Using the Copy function creates history.
 - b. Using the Copy function creates a record.
 - c. Using the Create function creates new information.
 - d. Using the Copy function with the same effective date erases the previous record.

Benefits Adjustments



- The Adjustments Reasons infotype (0378) may need to be maintained when:
 - A Qualifying Life Event (QE) occurs and is documented
- Employees have 30 days from date of QE to make allowable changes to benefits plans
- Agency verifies qualifying event documentation
 - Qualifying events documentation must be maintained according to State policy
 - Documentation is kept at the agency level
- Process PA30
- Create infotype 0378-Adjustment Reasons
 - Select applicable reason

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Notes

After an employee enrolls in a benefits plan, he or she can only make changes to the plan during the year when a Qualifying Event (QE) occurs, or during the annual enrollment period.

Examples of QEs are shown on the next two pages.

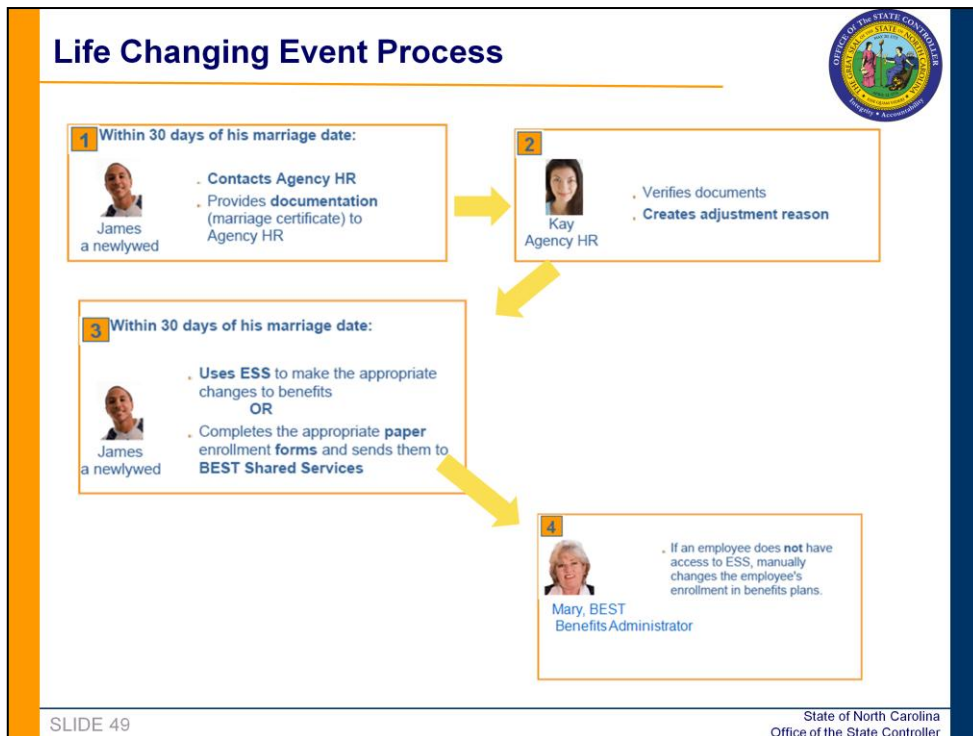
The agency is responsible for verifying the QE documentation and must maintain the documentation in accordance with State policy. Documentation is to be maintained at the agency level.

In order for the benefits to be changed, the HR Master Data Maintainer must create infotype 0378, Adjustment Reasons.

After infotype 0378 is created, employees can change their benefits by either:

- Accessing Employee Self Service (ESS) and making the change or,
- Completing applicable paper forms and submitting them to BEST Shared Services.

The effective date for infotype 0378 is the date of the qualifying event. For example, in the case of the birth of a child, it is the date the child was born.




Notes

Adjustment Reasons Subtypes

Adjustment Reasons Created by Agencies

- ADDF – Enroll family
- DCAR – FSA Dep Changes (dependent Child FSA changes)
- DRPF – Drop Family
- DTH – Death of Dependent
- DVC – Divorce
- MRG – Marriage (employee marries)
- MRGD – Dependent marries
- NCHD – Add Foster/Step Child
- NLS – No longer a student
- NEWB – Birth or Adoption of a Child
- SEP – Separation
- SMC – Substantial Money Change (> \$50)
- SRQ – Subscriber request
- STU – Student



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Notes

When infotype 0378 is created, there are several adjustment reasons listed in the drop-down list. However, only a few of those reasons (listed above) can be entered at the agency level.

If an employee has benefits adjustments other than those listed above, the employee must contact BEST Shared Services.

Adjustment Reasons Subtypes



Additional Adjustment Reasons Created by BEST Shared Services

- | | |
|--|--|
| <ul style="list-style-type: none"> • ADMN – Admin. Corrections (Administrative Corrections) • BENE – Beneficiary Changes • COR – Change of Residence • CTO – Court Ordered Support • FLOE – NCFlex Annl Enroll (NCFlex Annual Enrollment) • FSC – Cancel while on FMLA • FSN – FMLA Nonpayment • HIOE – Hlth Ins Annl Enroll (Health Insurance Annual Enrollment) • HIRE – New Hire (also used for reinstated employee) • LATE – Late Entry in Health (SHP only) • MCP – Medicare is Primary • MLT – Military Leave Term • NLS – No Longer a Student • NPY – Nonpayment of Health (SHP only) | <ul style="list-style-type: none"> • NWEL – Newly Eligible • ODP – Maximum Age Dep. • OLV – LOA without leave (and without pay) – note that the adjustment name is not the same as the name of the Action (LOA) • PTAX – Pretax to Post tax • REC – Hrs < 20 Not Eligible • RET – Retirement Changes • RFL – Return LOA (without Leave) – note that the adjustment name is not the same as the name of the Action (Reinstatement) • RHN – Reduced Hrs – No COBRA • SAV – Savings Plans • SMC – Subst. Money Change (Substantial Money Change) • STD – Short-term Disability • STU – New Student |
|--|--|

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Notes

BEST Shared Services has the authority to use all of the benefits reasons, including the ones used by the agencies (listed on previous page).


Additional reasons are listed above for which an employee must call BEST Shared Services.

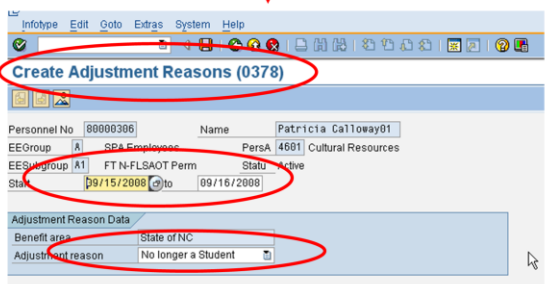
A complete list of the benefits adjustments is available online at BEACON University. Under Courseware and job aids, select the **Benefits** functional area, Benefits Job Aid folder, and the BN200 Adjustment Reasons file. The reasons with the asterisk (*) on this job aid can be created by Agency HR. The other reasons must be created by BEST Shared Services.

NLS – Agency or BEST?

- Employee notifies Agency within 30 days
 - **Agency** uses PA30
 - IT0378, subtype NLS
 - Enter Qualifying date

Note: Benefit plans starts/stop the first of the month after the IT0378 start date
 - Save
- Employee notifies Agency after 30 days
 - **BEST** process
 - Agency cannot process





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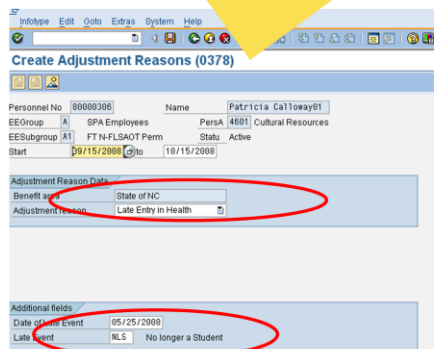
State of North Carolina
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Notes

When an employee's child no longer qualifies as student status, it is critical that the employee notify the agency within 30 days of the event. Otherwise, the Adjustment Reason cannot be processed at the agency level; it must be processed by BEST.

NLS – after 30 days – BEST as Late Enrollment

- Scenario:
 - Student graduates May 20
 - Employee notifies agency September 15
 - Must be processed by **BEST**
- Any claims paid on student from June 1 – September 15 must be repaid by employee
- Any premiums deducted for student from June 1 – September will not be reimbursed to employee
- New coverage begins October 1



Entered by BEST

Create Adjustment Reasons (0378)

Personnel No: 80000300 Name: Patricia Calloway01
 EEO Group: A SPA Employees PenIA: 4601 Cultural Resources
 EESubgroup: A1 FT N-FLSAOT Perm Status: Active
 Start: 09/15/2008 Date: 10/15/2008

Adjustment Reason Data
 Benefits as of: State of NC
 Adjustment Reason: Late Entry in Health

Additional fields
 Date of Event: 05/25/2008
 Late Event: NLS - No longer a Student

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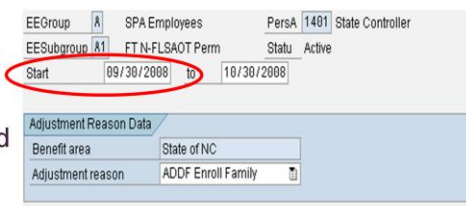
Notes

If notification regarding the child no longer being a student is done 30 days after the event, the employee must understand the following:

- Any claims that were paid on behalf of the student will have to be repaid to the insurance company.
- Any premiums that the employee had deducted to pay for coverage including the child will not be reimbursed.

Important Items

- Benefit Plans start the first of the month after the Adjustment Reason date (except birth of child).
- Use the appropriate Adjustment Reason.
 - COBRA events are triggered through the Adjustment Reason



EEGroup	A	SPA Employees	PersA	1401	State Controller
EESubgroup	A1	FTN-FLSAOT Perm	Statu	Active	
Start	09/30/2008	to	10/30/2008		

Adjustment Reason Data	
Benefit area	State of NC
Adjustment reason	ADD Enroll Family

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Notes

The effective date of IT0378 is critical. Except for birth of a child (benefits begin on date of birth), benefit plans start the first of the month after the Adjustment Reason date. So, for example, if a spouses loses job and health coverage on October 1, the Adjustment Reason date must be September 30 in order for State plan to start on October 1; otherwise if IT0378 is effective October 1, the State plan won't start until the first day of November.

Exercise #2.8**PA30 Maintain Employee Data –
Benefits Adjustment**

Emily Stafford has provided documentation that she just had a daughter who needs to be added to her benefit plan. The baby was born the first day of the current month.

Student #	Employee #
1	80000206
2	80000207
3	80000208
4	80000209
5	80000210
6	80000211
7	80000212
8	80000213
9	80000214
Instructor	80000215


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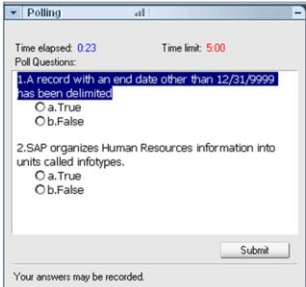
State of North Carolina
Office of the State Controller**Notes**

Use the data assigned in the Data Guide to complete the exercise.
Use eAssistant for step-by-step instructions.

Knowledge Check #3

– Use your computer to answer the questions and then click **Submit**.





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1. Examples of an Adjustment Reason include all but which of the following:
 - a. ADDF – Enroll family
 - b. MRG – Marriage
 - c. STU – Student
 - d. LTE – Late Enrollment
2. When an Adjustment Reason is created, the employee has how long to make allowable changes to their benefit plan?
 - a. 30 days
 - b. 60 days
 - c. 90 days
3. When an employees notifies BEST of an NLS (No Longer a Student) after 30 days, which of the following is true?
 - a. BEST backdates the effective date of the Adjustment Period.
 - b. Any claims paid after the NLS date must be repaid by the employee, and the paid premiums after the NLS date will not be reimbursed.
 - c. BEST informs the employee to have the student re-enroll.
 - d. All claims for the student will be paid regardless of the Adjustment Period dates.

Notes

Lesson Review



In this lesson you learned to:

- Describe the process to modify (or maintain) employee data
- Identify the transaction code used to update employee data
- Distinguish among the editing functions
- Use OSC HR/Payroll SAP to maintain employee data
- Identify the steps needed prior to creating an employee's benefits adjustment
- Create a substitution
- Revise a work schedule
- Create a benefits adjustment

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Notes

Course Map

Lesson 1: Modifying Position Settings


Lesson 2: Modifying Employee Data

Lesson 3: HR Reports Overview

Lesson 4: Course Review

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Notes

Lesson Objectives



Upon completion of this lesson, you should be able to:


- Identify the two applications that house reports
- Describe how to access reports in both applications
- Describe the available HR reports
- Add additional fields to an OSC HR/Payroll SAP report
- Use multiple selections in a specific field
- Execute and view an OSC HR/Payroll SAP HR report

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Notes

Where to Find Reports



SAP	BI
Real time data*	Data at a point in time *
Transactional reports	Analytical reports
Performance considerations for large data volumes	Aggregation of large data volumes
Data by functional area	Merge disparate data
Current data only	Include history data with current data

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Notes

Human Resources reports are housed in both OSC HR/Payroll SAP and Business Intelligence (BI). You can see in the comparison above the advantages of each reporting system.

You can see a list of BI reports (and a description) by accessing the applicable job aid from BEACON University. A list of the SAP HR reports is available from the SAP reports menu.

For more information on reports, see the online reporting class.

* Many OSC HR/Payroll SAP transactions are posted at the time the entry is made. Therefore, when you run an OSC HR/Payroll SAP report, for example for today, the data is current including today's data. Data is loaded into BI daily; therefore when you run a report in BI, for example for today, you are actually viewing yesterday's data.

BI Reports (1 of 2)

The screenshot shows the BI Reports interface. On the left, a list of reports is displayed, including 'Performance Review', 'Temporary Employee', 'Cross Agency', 'Turnover', 'Employee Headcount by Org Structure', 'Veterans', 'Employee Headcount by Org Structure', 'Regulatory Increase', 'Compensation', 'Employee Details & Actions', 'Longevity & Retirement', 'Regulatory Reports', 'EOC Standard Occupational', 'Qualifications', 'Leave Balances', 'Employee Details & Actions', 'Grievances', 'EO', 'Liability', and 'Disciplinary Actions'. A callout labeled '1st' points to the 'Reports' tab in the top navigation bar. A callout labeled '2nd' points to the 'Variable Entry' section, which contains a table with columns 'Variable', 'Current Selection', and 'Description'. The table lists 'OrgUnit(s) (Mandatory) (*)' with a value of '20001932' and 'Calendar Day Single Input (Mandatory) (*)' with a value of '12/31/9999'. A callout labeled 'Enter mandatory variables' points to the 'Current Selection' column.

Select report

2nd

Enter mandatory variables

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Notes

If you have security access to run BI reports, you will see a Reports tab on your portal.

On the initial screen, you first select the report name in the left panel.

Next, enter the mandatory variables (Org Unit and date).



BI Reports (2 of 2)



Home
Reports
SAP GUI

Personnel Admin
Organization Mgmt
Benefits
Cost Center

Selected Navigation

- [-] Performance Review
- [-] Temporary Employees
- [-] Cross Agency Verification
- [-] Turnover
- [-] Veterans
- [-] Employee Headcount by Org Structure
- [-] Legislative Increase
- [-] Career Banding
- [-] Foreign Nationals
- [-] B0164 - US Employment Eligibility Ver
- [-] 80066: Residence Status**
- [-] Compensation
- [-] Employee Details & Actions
- [-] Longevity & Retirement
- [-] Legislative Reports
- [-] EEOC Standard Occupational
- [-] Qualifications
- [-] Leave Balances
- [-] Employee Details & Actions
- [-] Disincentives
- [-] EEO
- [-] Disability
- [-] Disciplinary Actions

No connection to system BITCLNT7000 available

No connection to system BITCLNT7100 available

80066: Residence Status

New Analysis
Open
Save As...
Display As: Table
Information
Send
Print Version
Export to Excel
Comments

Columns	Org Unit	Employee ID	Employee's Name	Position	Residence Status
[-] Rows	20001071	79132205	GHONGE, AMOL	60009827	BUS AND TECH APP SPEC
[-] Org Unit	20001484	79139609	WANG, SULBO	60013605	INSURANCE CO EXAMINER I
[-] Employee	20001934	79239566	LILES, KESHA	60017453	BUSINESS OFFICER I
[-] Employee's Name	20003247	79225804	BATTEPATI, SUMITA	60032778	BUS AND TECH APP ANALYST
[-] Position	20003862	79202251	PRAKHU, PURVA	60035646	ENVIRONMENTAL ENGINEER I
[-] Address/Contact	20004219	79215860	SHERKI, SALMAN	60030682	BUS AND TECH APP ANALYST
[-] Visa Number	20004221	79216253	VAKA, SREENADHA	60038149	BUS AND TECH APP ANALYST
[-] Expiration Date	20004491	79245155	COYOOC, ELIAZAR	60040821	SOCIAL WORK SUPV I
[-] Passport Number	20004538	79202825	SHMONI, ADI	60040512	OCCUPATIONAL THERAPIST I
[-] Free Characteristics	20004665	79221684	ZHANG, ZHONG	60041294	CHEMIST I
[-] Employee Group	20004687	79189300	SCHMID, DOROTHEE	60041551	SOCIAL/CLIN RESEARCH SPEC
[-] Employee Subgroup		79225801	FAN, YUAN	60041441	SOCIAL/CLIN RESEARCH SPEC
[-] Ethnic Origin		79207975	NU, JIANGHUO	60041426	BUS AND TECH APP ANALYST
[-] Gender	20004748	79216212	ANNAIRAJU, SODHAKTHA	60043855	PHYSICIAN II - A
[-] Job	20005056	79182072	NATHAN, SHALAT	60045646	PHYSICIAN II - B
[-] Job Branch	20005488	79213438	USOCHUKWU, KINGDSLEY	60048135	PHYSICIAN II - B
[-] Job Family	20005543	79197748	SHORTELL, SUSAN	60047509	REHABILITATION THERAPIST
[-] Personnel Area					
[-] Personnel Subarea					
[-] Pos Addr City					
[-] Pos Addr Street					
[-] Pos County					
[-] Supr Employee					
[-] Supr Position					
[-] Visa Date of Issue					
[-] Visa Date of Entry					

Drag and drop fields onto the report

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Notes

On the next screen, you can literally drag and drop any of the fields from the free characteristics list onto the report. The rows and columns above the free characteristics section automatically default into the report.

You can print the report, write comments, send to someone else, or export to an Excel spreadsheet.

V1_120709

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Accessing OSC HR/Payroll SAP Reports



The screenshot displays the SAP Easy Access interface. On the left, a navigation menu lists various SAP functions under categories like 'Office', 'Human Resources', 'Personnel Management', 'Administration', 'Reports', 'Time Management', 'Payroll', 'SAP Learning Solution', 'Training and Event Management', 'Organizational Management', 'Travel Management', and 'Information System'. The 'Reports' category is expanded, showing sub-items like 'Employee', 'Organizational Entity', 'Documents', 'Administration', 'Administration Japan', 'Administration Malaysia', 'Administration Public Sector Great Britain', and 'Administration Public Sector Belgium'. On the right side of the screen, the 'BEACON TRAINING' logo is prominently displayed. The logo features a circular emblem with the text 'OFFICE OF THE STATE CONTROLLER' and 'Integrity & Accountability' around the perimeter. The background of the right side is white with the text 'BEACON TRAINING' in large, bold, blue letters.

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Notes

The OSC HR/Payroll SAP reports are accessed via the Easy Access screen, or by using the applicable transaction code. The reports are categorized according to employee, Organizational Management, documents, administration compliance and administration garnishments.

Since the report output is determined by your security role, you will only see those employees for which you have been given security access.

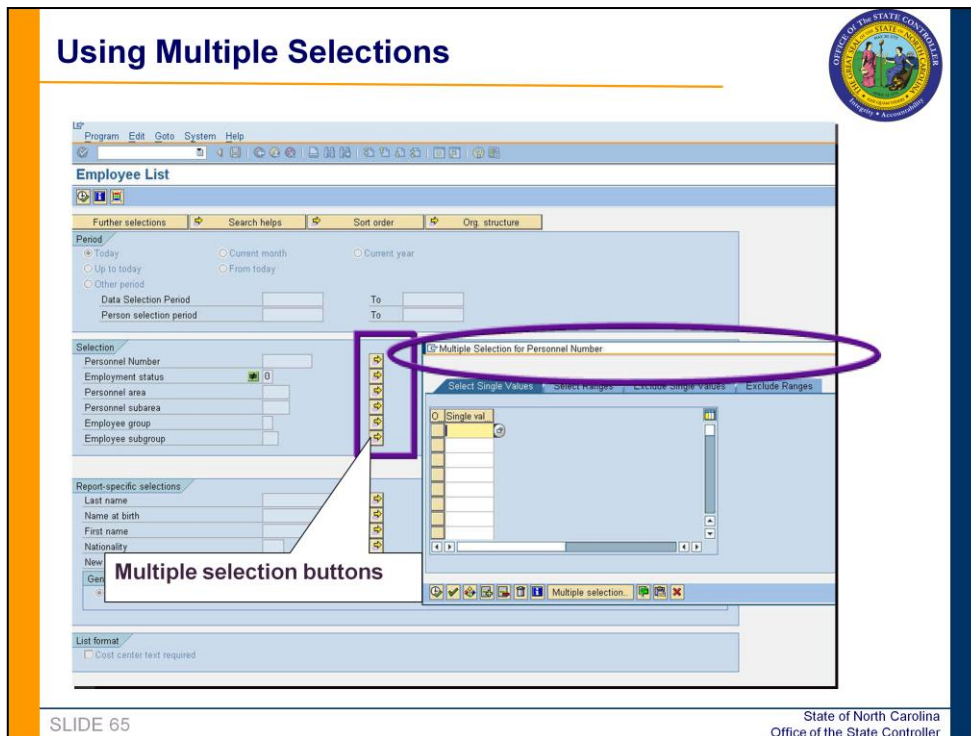
Notes

In OSC HR/Payroll SAP, the first screen of each report allows you to specify the data you want to view in a report. The type of fields that display on the selection screen differ for each report.

NOTE! You should never run the report without specifying the selection criteria. If you do not specify selection criteria, the OSC HR/Payroll SAP system must search through the entire database for the employees to which you have security access. If several people are running reports at the same time without any selection criteria, the capacity of the OSC HR/Payroll SAP reporting system is unnecessarily taxed which could result in a slow response.

OSC HR/Payroll SAP reports have many options and functions. In this class, we only cover a few of them. The selection screen includes:

- **Period:** Select specific time frames that you want included in the report. To specify a specific date (or range), you must select the *other period* radio button and then enter the dates.
- **Selection:** In this area, you select the specific criteria you want included on the report, for example, personnel area, employee status, just to name a few.
- **Further selections button:** Use this function if you want to add, or remove fields to the *Selection* area. Observe in the illustration that the *Personnel Area* and *Personnel Subarea* fields are not present in the Selection area. You can use the Further selections button to add those fields to the screen.



Notes

The yellow arrows beside each field are called *multiple selection* buttons. When you click the arrow, a new window is displayed. On that window, you can use the tabs to indicate :

- Additional single criteria
- A range of criteria
- Single criteria to exclude
- A range of criteria to exclude

Observe in the illustration above that the Selection button was used to add the Personnel Area and Personnel Subarea fields. They now display on the screen as fields to be used for selection criteria.

Entering the appropriate selection criteria is key to getting accurate report results. For example, if you narrow your selection criteria too small, you may get a message that there are “no values”.

Executing a Report

The screenshot displays the 'Employee List' report interface. At the top left, a menu icon is circled with a callout 'Stop the transaction'. Below it, another icon is circled with a callout 'Execute button'. The interface includes sections for 'Period' (Today, Up to today, Other period), 'Selection' (Personnel Number, Employment status, Personnel area, Personnel subarea, Employee group, Employee subgroup), and 'Report-specific selections' (Last name, Name at birth, First name, Nationality, New employees in period, Gender). A 'List format' section at the bottom has a checkbox for 'Cost center text required'. The bottom of the slide is labeled 'SLIDE 66' and 'State of North Carolina Office of the State Controller'.


Notes

When you have entered all of the selection criteria, click the Execute button to run the report.

NOTE: Sometimes when you are running a report, or performing other transactions, the system may display to be taking an inordinate period of time. You can stop the transaction by clicking the icon at the top left of the screen, and selecting **Stop Transaction** from the menu.


Exercise #3.1

Run the Employee List Report for personnel area 4601



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Notes

SAP reports can be run from the SAP Easy Access screen via the following menu:

Select *SAP menu > Human Resources > Personnel Management > Administration > Infosystem > Reports > Employee*

For this exercise use the menu and select Employee List.

Lesson Review



In this lesson you learned to:

- Identify the two applications that house reports
- Describe how to access reports in both applications
- Describe the available HR reports
- Add additional fields to a OSC HR/Payroll SAP report
- Use multiple selections in a specific field
- Execute and view a OSC HR/Payroll SAP HR report

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Notes

Course Map

Lesson 1: Modifying Position Settings


Lesson 2: Modifying Employee Data

Lesson 3: HR Reports Overview

Lesson 5: Course Review

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Notes

Course Review



In this course, you learned to:

- View position transaction code and infotypes
- Modify existing position and employee data
- Identify the options to access reports

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Notes

Next Steps

Monitor OSC HR/Payroll SAP communication

- BEST Shared Services web site (especially the Updates tab)
 - URL: <http://www.osc.nc.gov/BEST/index.html>
- BEACON Training website: **What's New** link
 - URL: http://www.osc.nc.gov/beacon/training/whats_new.html



Review conceptual materials

Access BEACON Help

- Access from an SAP transaction
 - URL: <http://help.mybeacon.nc.gov/beaconhelp>

Practice what you've learned

- URL: <https://mybeacon.nc.gov>
- Client 899
- Use your current NCID user name and password



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Notes

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance after go live?

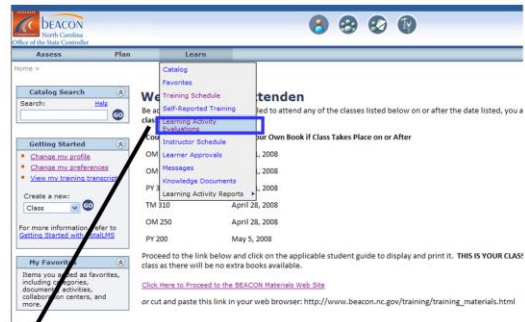
- Remember to access BEACON Help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON Help from within an SAP transaction.

Level 1 – Course Evaluation



Enter by accessing LMS

- Provides feedback to training team
- Ensures students experience instruction in an environment and method conducive to learning



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Notes

1. Open a new internet browser and type the url:
<http://rod.sumtotalsystems.com/beacon>
2. At the Log On screen, enter your full email address and password. If you cannot log into LMS, unmute your telephone and let the instructor know. The instructor can reset your password if you have forgotten it.
3. Click **Logon**.
4. On the blue horizontal bar near the top of your screen, click **Learn**, and then click **Learning Activity Evaluations**.
5. Locate the evaluation that corresponds to the class you've just completed and click the **Start** button to launch it.
6. Complete the evaluation.
7. Click the Training Center icon and then click the green check to let the instructor know you have completed the evaluation.

If you cannot access the evaluation, please unmute your telephone and let the instructor know.

Conclusion



CONGRATULATIONS



You have completed the course

Please complete your course evaluation!

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Notes